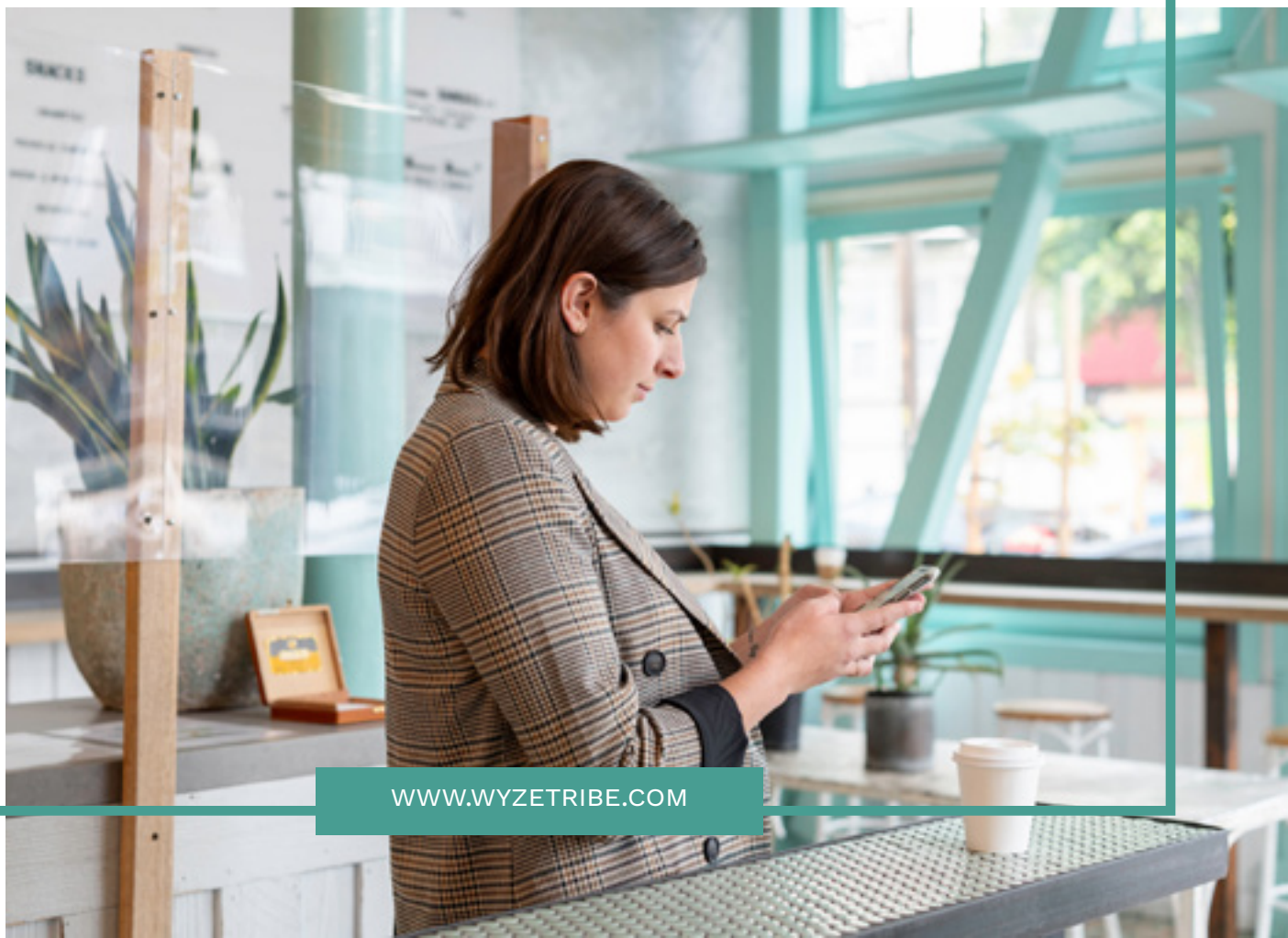
5 Easy Opportunities to Streamline Your Business



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Do you ever feel overwhelmed with too much to do and not enough time to do it?

Do you feel like you're working really hard, but you wouldn't know it by the size of your bank account or leads database?

These are some common complaints of entrepreneurs and small business owners. ***Everyone faces at least one of these challenges***, if not all of them so don't feel like you're alone. But if being in good company has you saying, that's great, but what's the solution, then keep reading.

In this document we'll give you 5 easy opportunities for you to streamline your business so you can have more of your precious time to do more of what you love and less of what you don't, fill your database with qualified leads, and convert more of those leads into paying clients.

> ***Freedom is the game, customized automation is the strategy!***



1 Stop Letting Everyone Into Your Funnel

Take a moment to identify your ideal client. Have you ever seen a character on TV or in a movie and thought “man I could never be friends with that person”? Have you ever had a client that turned out to be your worst nightmare? Not every personality connects with every other personality. It’s completely normal not to resonate with someone. It’s also important to only surround yourself with people that share your values.

Oftentimes people think that they will limit their sales or appear off-putting if they narrow down their target audience.

First, you do not have to announce who your target audience is to the world. Understanding who your target audience is means you can use brand colors, fonts, photos and videos that will resonate with them more. Doing this will naturally attract your ideal clients and detract the ones that do not resonate with you. This is a good thing!!

Second, this couldn’t be further from the truth. Targeting your ideal clients, clients that share in your values, that have a mutual respect for the same things you do, are going to create this tornado effect where you feed each other with positive energy, which will attract more like minded folks like a magnet. The tornado will keep growing as will your impact.

Another common pitfall we see are those folks in an industry that can literally serve anyone - like health & wellness, beauty, etc... While the industry can serve everyone, it doesn't mean you have to. I have a client who is a Pilates instructor. Pilates is for everyone and can be beneficial to everyone, however this client focuses on women over the age of 60 and specifically those that believe they can't have the body of a 30 year old. She is a young, vibrant, full-of-joy, 60-year-old modeling what she preaches. She also attracts men over 60 and some younger-than-60 folks, which she welcomes with open arms. Her website clearly shows women over 60, but she attracts everyone that resonates - folks that have been marginalized; feel like they don't have a fitness home somewhere else, folks that also want to look & feel that good at 60, etc...

Finding your ideal client is about who would fill your heart with joy to be around every day. Model your ideal client persona - aka character description - after that person or people. Then update your brand, content, and media to mimic and cater to that type of person. If you don't know how to do this, ask your connections on Facebook that are like this ideal person of yours what they think of .... Ask them what the content/photos etc... say to them.

If you make sure you're not asking leading questions, you'll get some valuable information to enhance your site and, in turn, atract attract the right people into your funnel.

Finally, if you get really clear on who your ideal client is, you give people in your network clear guidance on how to refer you, because they'll know exactly who to refer you to. It's sort of like your friends & family setting you up on a blind date. If they're not clear on what "your type" is, they'll just keep trying until they get it right, but if you tell them exactly what you're looking for, the chances their dart will hit the bull's-eye becomes a whole lot better.

Stop Letting Everyone Into Your Funnel

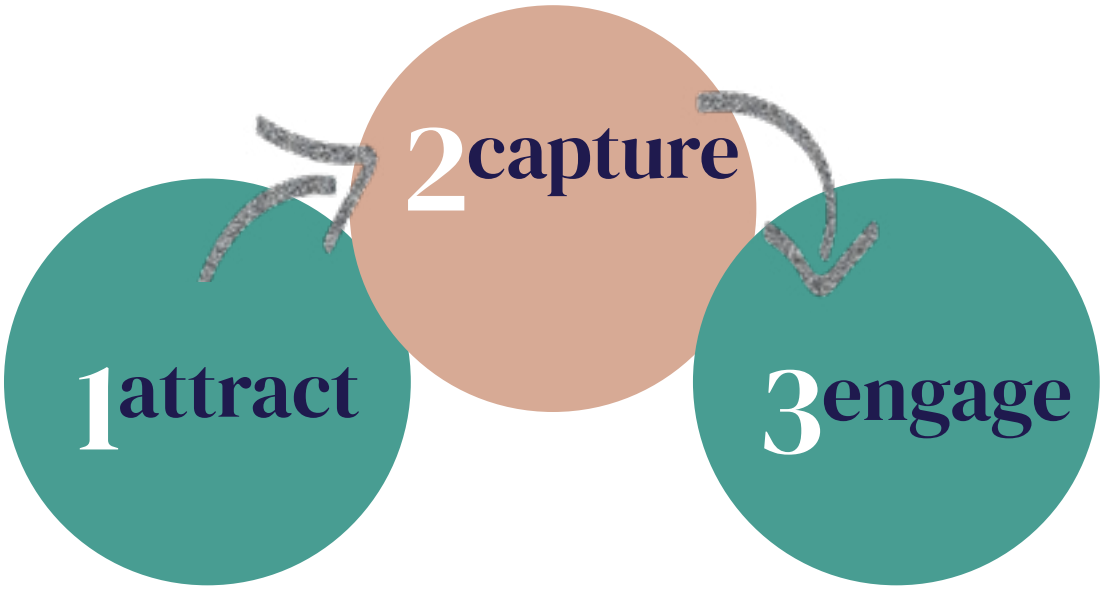
5 EASY OPPORTUNITIES TO STREAMLINE YOUR BUSINESS

2 Optimize Your Lead Capture Opt-ins

If you said yes to needing more leads, then let me ask you - how are you attracting your leads? How are you capturing them? What are you doing with them afterwards?

Let me guess, you're spending tons of time on social media posting daily, if not more frequently, you've created Facebook groups, you're in other people's Facebook groups, you're advertising on social media or on Google, you're attending networking events, and maybe you're even speaking on OPP (other people's platforms) to promote yourself. You're doing all this work and yet your leads database is filled with dust.

That's because attraction is only a third of the equation. If you want to ACE™ your database, you need all three components:





Attract

Remember number one above? Don't just attract, attract your ideal client. That means, don't waste your time being at places or on platforms that do not cater to your ideal client. You need to find where your ideal client hangs out and be there!!! What does this mean exactly? If you're a B2B - be on LinkedIn. If your ideal clients are women and your products are DIY or visual in nature, be on Pinterest. You need to figure out where your ideal client spends 80% of their time and you target 80% of your marketing to that platform. Then you can use the other 20% of your marketing time to keep your options open by being on the other platforms. You can use a tool like **Later** to target your posts to a specific platform, but then post copies of that same post to other platforms.

Capture

People often forget the capture piece of the 3-part equation. More specifically, capture has two components and most people only do one of them. Not capturing exposure and not consolidating leads into a single location means that you are creating missed opportunities.

You may have a wealth of high-value, qualified leads at your fingertips, or even in the palm of your hands that you are not taking advantage of.

If you do nothing else, ensuring you are properly doing the two steps of capture, could dramatically increase the size of your leads database, and set you up for success converting those leads into paying clients, here's how:



FOOLPROOF OPT-IN ON EVERY STAGE

List out all of the places you are getting exposure: social media, webinars, live events, product & service offerings, marketing platforms, referrals, your own websites & tools, etc...

Check off all the items on your list that advertise or lead to an opt-in. I want you to be realistic with yourself, is your opt-in an easy yes for your ideal client - aka a "must have", is the way to opt-in easy to do, easy to say, and easy to remember, and finally when you gave the opt-in did you tell people to do it now or write it down, and did your repeat yourself at least 3 times?

If you said no to any of these questions for any of the checks on your list, I want you to cross them out or erase them.

Look at your list if there are any items remaining without checks, you have work to do. You are missing an opportunity to capture leads where you're gaining exposure.

THE COMPONENTS OF A GREAT OPT-IN

The best opt-ins ask for one piece of information that coincides with the platform they're on. For instance, if you're live at an event, offer a mobile opt-in. People will essentially be giving you their phone number without having to physically type it out. Make sure your keyword is easy to say, easy to spell, and memorable. For example: if you're on the radio and your audience is driving, you want to ensure they'll remember your opt-in word, how to spell it, and what to text it to, when they're able to enter it. Make sure your opt-in supports international opt-ins if you're in front of an international audience. If it does not, provide an alternative opt-in for them.

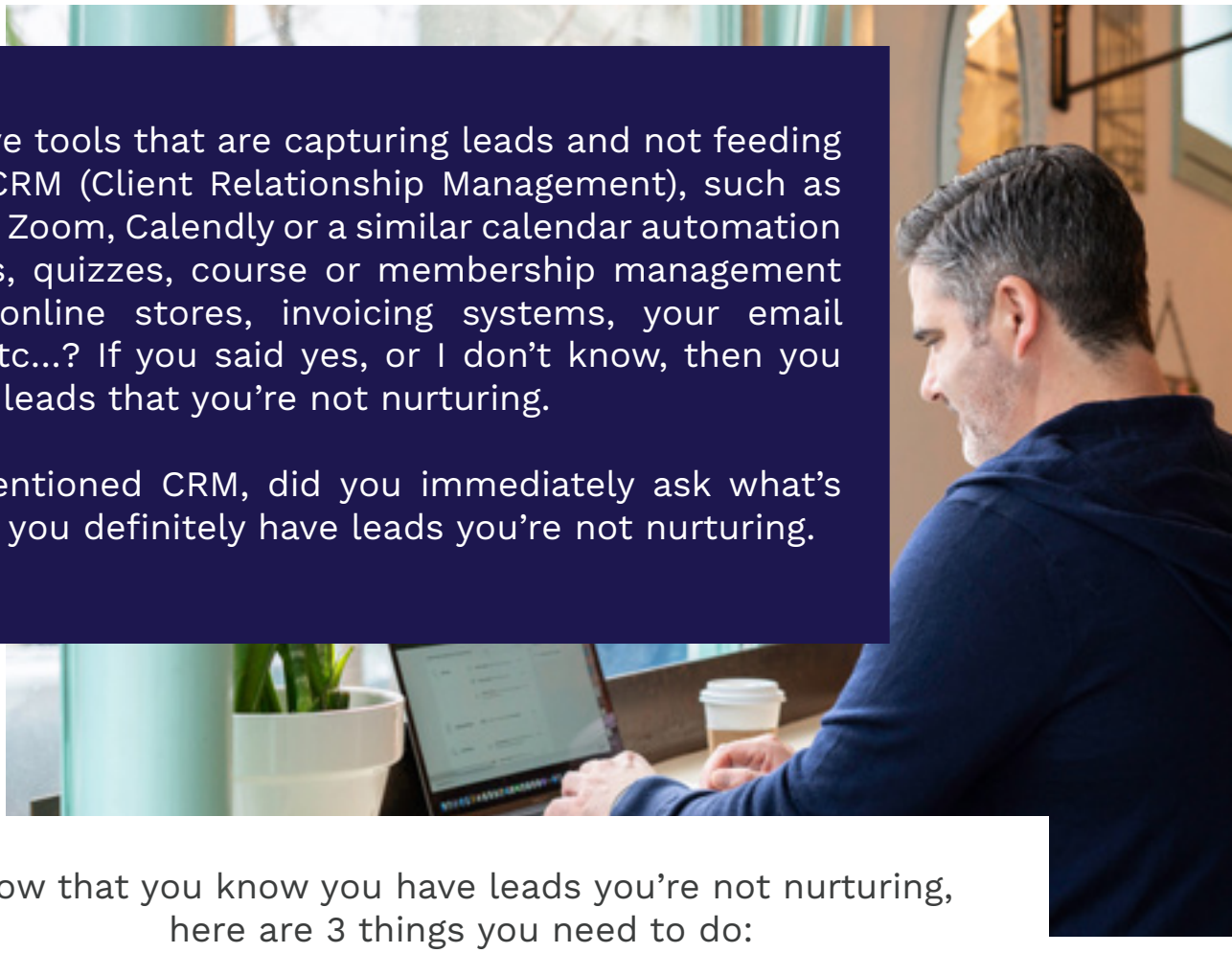
You can offer an email opt-in everywhere else, but only ask them for their email address. Your conversion goes down with each additional piece of information you request, including name, and email confirmation.

Every opt-in, regardless of whether it's phone or email, **should be associated with an automated follow-up campaign**, which we'll talk about more in the Engage section.

CONSOLIDATE YOUR LEADS INTO A FULL-FEATURED CRM

Have you ever seen one of those commercials that say you could have money somewhere and not even know it? This is kind of like that. I bet you definitely have leads somewhere that you're not nurturing.

For example, do you have email addresses for all of your social media contacts? If you said no, then you have leads you're not nurturing.



Do you have tools that are capturing leads and not feeding into your CRM (Client Relationship Management), such as Eventbrite, Zoom, Calendly or a similar calendar automation tool, forms, quizzes, course or membership management software, online stores, invoicing systems, your email account, etc...? If you said yes, or I don't know, then you likely have leads that you're not nurturing.

When I mentioned CRM, did you immediately ask what's that? Then you definitely have leads you're not nurturing.

Now that you know you have leads you're not nurturing, here are 3 things you need to do:

01 Get a fully featured CRM with built in automated communication and analytics.

02 Hook up these external accounts to your CRM using integration tools like: CloudHQ and/or Zapier so that all new leads go straight into your CRM.

03 Bring all existing leads from all these external platforms into your CRM.

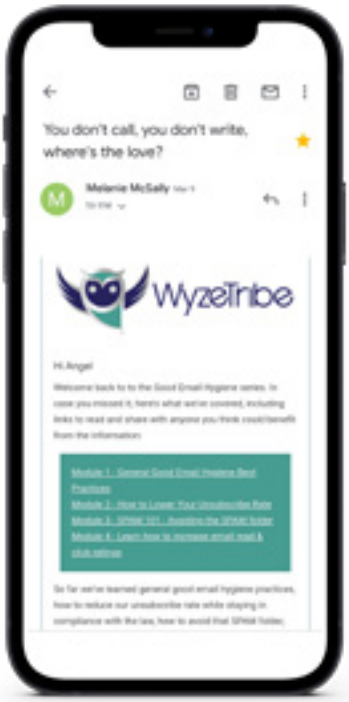
As always, if you need help with any of these things we're here to help. In fact, we have an Entrepreneur Startup Kit that we'll customize for you to get you all set up with a foundation that will have you feeling confident you're ready to attract, convert, engage, and serve.

Click here to learn more

Engage

Did you know leads go stale just like chips? Have you ever had stale chips? Gross, right? Well, just like stale chips, you can turn off your leads by reaching out to them after months of silence.

Do you have one of those people that you immediately know they want something when they call? This is learned behavior. They only call when they want something so when they just call to say hi, or so they say, you immediately see right through them. Well, just like this person, people can think that about you or your company if all your communications are geared towards selling them something.



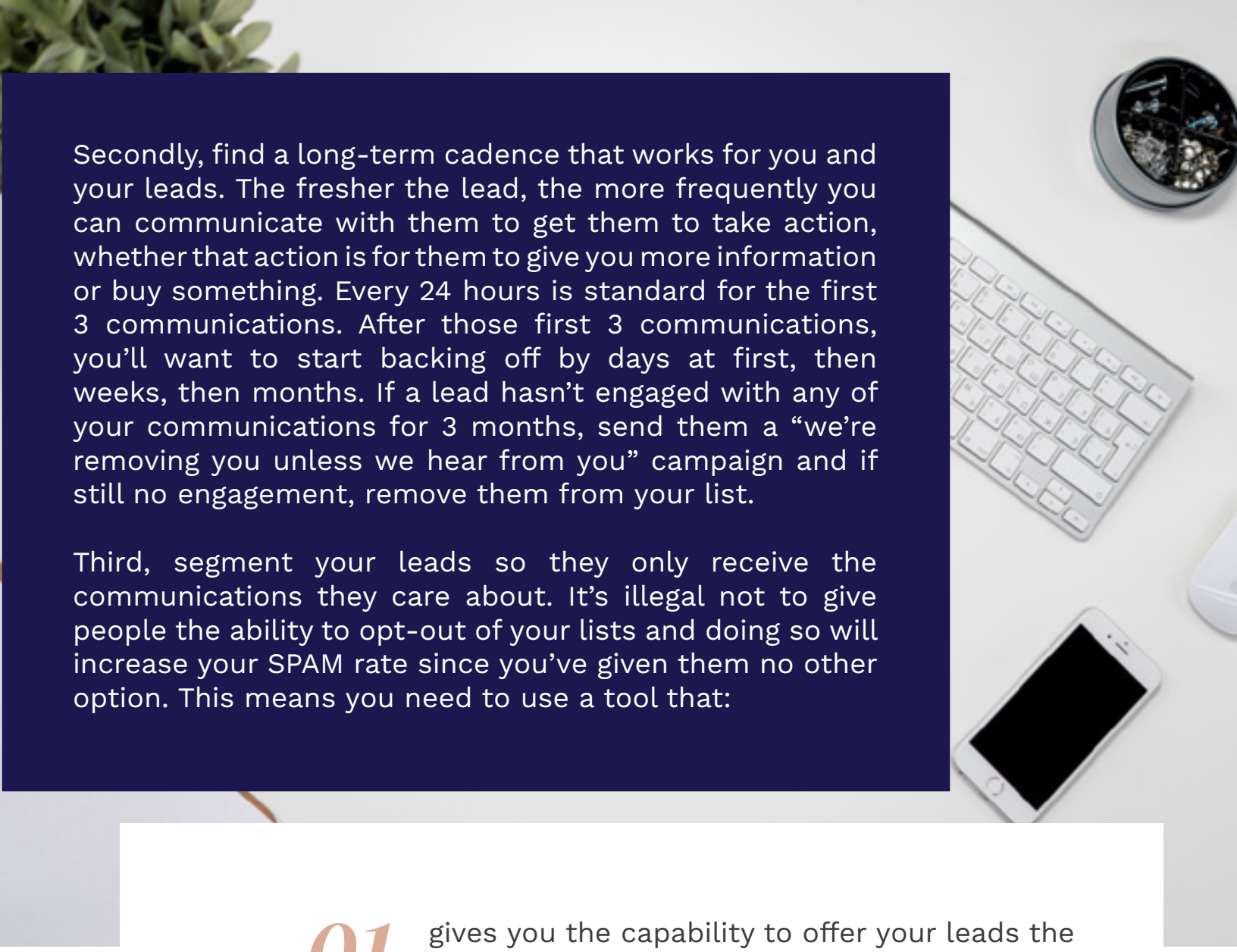
WHAT SHOULD YOU DO?

First, **do be consistent**. Follow-up with your leads immediately after they opt-in to give them what you promised.

Then, follow up with them to gain the other pieces of information you need, such as name and email if they came in by mobile or mobile if they came in by email. To expedite getting information faster you have two options:

1. invite them to apply or see if they're a good fit for a particular service, then send them to a questionnaire.

2. sell them something small, something all your ideal clients will want and it's less than $20 - the lower the price the higher the conversion. This option gets them to take out their cc, puts money in your account, and you get tons of information about them through the checkout form.



Secondly, find a long-term cadence that works for you and your leads. The fresher the lead, the more frequently you can communicate with them to get them to take action, whether that action is for them to give you more information or buy something. Every 24 hours is standard for the first 3 communications. After those first 3 communications, you'll want to start backing off by days at first, then weeks, then months. If a lead hasn't engaged with any of your communications for 3 months, send them a "we're removing you unless we hear from you" campaign and if still no engagement, remove them from your list.

Third, segment your leads so they only receive the communications they care about. It's illegal not to give people the ability to opt-out of your lists and doing so will increase your SPAM rate since you've given them no other option. This means you need to use a tool that:

01 gives you the capability to offer your leads the ability to opt-out

02 offers you the ability to create automated emails by lists or specific opt-ins

03 offers your leads the ability to opt-out of one list without opting out of all communications.

Finally, follow the 80/20 rule; eighty percent of all of your communications should bring value and only twenty percent should focus on sales & marketing.



3 Automate Your Onboarding Process

If you were one of those people who said yes at the beginning of this document about not having enough time, then this is the step for you; the onboarding process is a great opportunity for optimization.

When most of our clients came to us their onboarding process consisted of an interview to determine fit, manually sending an estimate or invoice, and then upon approval & payment, they'd manually send them a contract and potentially a project plan, and finally they'd set up meetings. Does this sound familiar?

Even if this doesn't represent your process completely, you are probably doing at least some of these steps, all of which can be automated without you giving up that personal touch with your clients, here's how:



01

Use an automated calendar tool, such as Calendly, Acuity, etc... to allow people to schedule their appointments themselves.

02

Setup your automated calendar tool to have a pre-meeting questionnaire, that you can use to pre-qualify leads or gather information you need from clients.

03

Integrate your automated calendar tool with your CRM so they're already in your database when you meet with them and all of their answers are associated with their profile.

04

Integrate your contract tool with your CRM to automate adding new clients to your contract signing tool. What's a contract tool? It's a tool that allows you to accept e-signatures on contracts and has the ability to send customized contracts, already equipped with your signature, automatically or with a single click.

05

Integrate your invoice system with your CRM to automate adding new clients to your invoicing tool. What's an invoice tool? It's a tool that allows you to send invoices and receive payments online as one-time payments or automatically on a recurring basis.

06

Setup products, services, and packages in your invoicing system to make creating estimates and invoices easier and faster.

07

Integrate your CRM with your communication automation tool so that your leads and clients are receiving regular communications throughout the process.

Now, if you want to get all fancy, you can use an automation tool to string all of these steps together to create a workflow. Workflows are a series of steps that happen sequentially or in parallel that can happen automatically, or trigger manual intervention.

As mentioned earlier, if this sounds like something you want/need, but you have no idea where to start, we have an Entrepreneur Startup Kit that we'll customize for you to get you all set up automating your onboarding process(es).

Click here to learn more



4 Streamline & Automate Your Communication

As mentioned earlier, leads can go stale like chips. Leads can also turn against you thinking you are only out to sell them something. How do you know how much communication is too much and what is not enough?

If you've done any research you know, there are a number of laws and regulations around data capture and automated communications. These laws and regulations can be hard to understand, even harder to know how to follow, and seemingly impossible to keep up with.

If you're not taking advantage of automated communication because of one of these two reasons, then you're not alone. In fact, these two reasons are the most common reason we hear when people come to us for help.

Honestly, there are way too many laws & regulations for us to list them all here, and in fact, it wouldn't be in our best interest to do so since they could change at any point. So here are our tips that will be valid, regardless of any future changes to the laws:

01

Hire a business contracts lawyer from the location your business resides in. In the United States, this would be the state your business resides in. You want a lawyer that is small business and online sales savvy, one that has written contracts for your industry in the past, and one that can offer you an Internet Package. An internet package will usually include a Privacy Policy, a Terms & Conditions, a Client Contract, a Non-Disclosure, as well as other contracts that are specific to your industry. It is important that you hire a lawyer and start to develop a relationship with said lawyer at this stage of the game, rather than just purchasing a template, because not all templates are created equal, and you want to be sure your contracts cover you when you need them to. Having a contract is like having insurance, unless you understand the terminology in them, you are never quite sure if you are covered until something goes wrong and you find out you're not. The best way to avoid that is to hire a professional.

02

Invest in a full-featured CRM with built-in communication automation. Most of these tools have built-in features that force you to comply with laws and regulations so just using one of these tools gets you part of the way there.

03

Segment your leads and clients into lists that will allow you to target your communications and allow them to opt out of the ones they do not want to receive without opting out of all of your communications entirely.

Do not buy leads!!!!!!!!!!!! Buying leads is a surefire way to fall into an “Email Trap” - trust us this is bad!

04

Use the sliding scale method for communication frequency. As new leads enter your database send them an immediate response with whatever you promised them. Then use your next two communications, spread apart by 24 hours each, to give more incentive to take action, whether that action is to give you more information or buy something. After that spread your communications out further, one to two a week, then once-per-month, etc... If a lead has not engaged with you in 3 months you can put them into a last-chance campaign and if they still do not engage, remove them from your list. Stale chips can either come from you leaving the bag open (aka not communicating enough) or too much time has passed (them not engaging with you). Either way, these leads are stale and continuing to send them automated communications could put you into an “Email Trap” - again, this is bad.

05



If you find this information useful, and are interested in help getting setup, click here to check out our customizable Entrepreneur’s Startup Kit.





5

To Strain or To Funnel, That is the Question

You're familiar with a strainer right... you put your pot of water and spaghetti into it so the spaghetti stays put while the water drains out. You're probably also familiar with a funnel... you have this big container of oil and you need to get it into this tiny hole so you insert this contraption, known as a funnel that has a bigger hole at the top and a smaller hole at the bottom that fits into your oil reservoir.

What's the main difference between the two? If you said the number of holes, you're correct. The concept of a funnel is to take a large quantity of something and squeeze it down into a smaller one without losing any along the way. This is why there is only one hole at the top and bottom.

Whereas a strainer, on the other hand, doesn't care about losing a drop because its main focus is on separating the thing you want to keep from anything you don't.

So when it comes to sales and marketing, which one do you want?

The answer, both! To demonstrate, let's go back to the ACE™ method:

Attract

You want to advertise everywhere and anywhere your ideal client is at because you never know how people might find you. You should optimize your time by figuring out where they spend 80% of their time and focus 80% of your marketing time there, but you also don't want to close off any doors, so use your remaining 20% to keep your options open. In this regard, we're using a strainer - we're filtering our ideal client from everyone else.

Capture

As mentioned above, you still want to offer your opt-in wherever you are attracting potential leads and even though you're targeting the locations of your ideal client, other, less favorable people will be there as well. This is ok because you are going to target your brand (colors, fonts, graphics, and content) towards appealing to your ideal client. This will naturally give you a strainer vs a funnel, weeding out anyone that doesn't resonate with your brand.

Engage

As mentioned above, you want to engage your audience to keep them from getting stale and to squeeze them towards taking action. In this case you want a funnel rather than a strainer - you do not want to lose anyone that IS your ideal client by allowing them to fall through a side hole. Instead, you want to move them to the next step.

Now, here's where it gets tricky - one of those steps could be a qualifying survey. "Click here to see if you qualify" or "Click here to apply" or "Click here to see if you're a good fit". These types of surveys are not necessarily for small, passive products like books or small DIY courses, but they are a good fit for any product that requires your time, such as group or private coaching, in-real-time courses, etc... In this regard, you are intentionally creating a strainer to filter out anyone that would not be a good fit for your private time.

Strainer vs Funnel Strategy by Platform

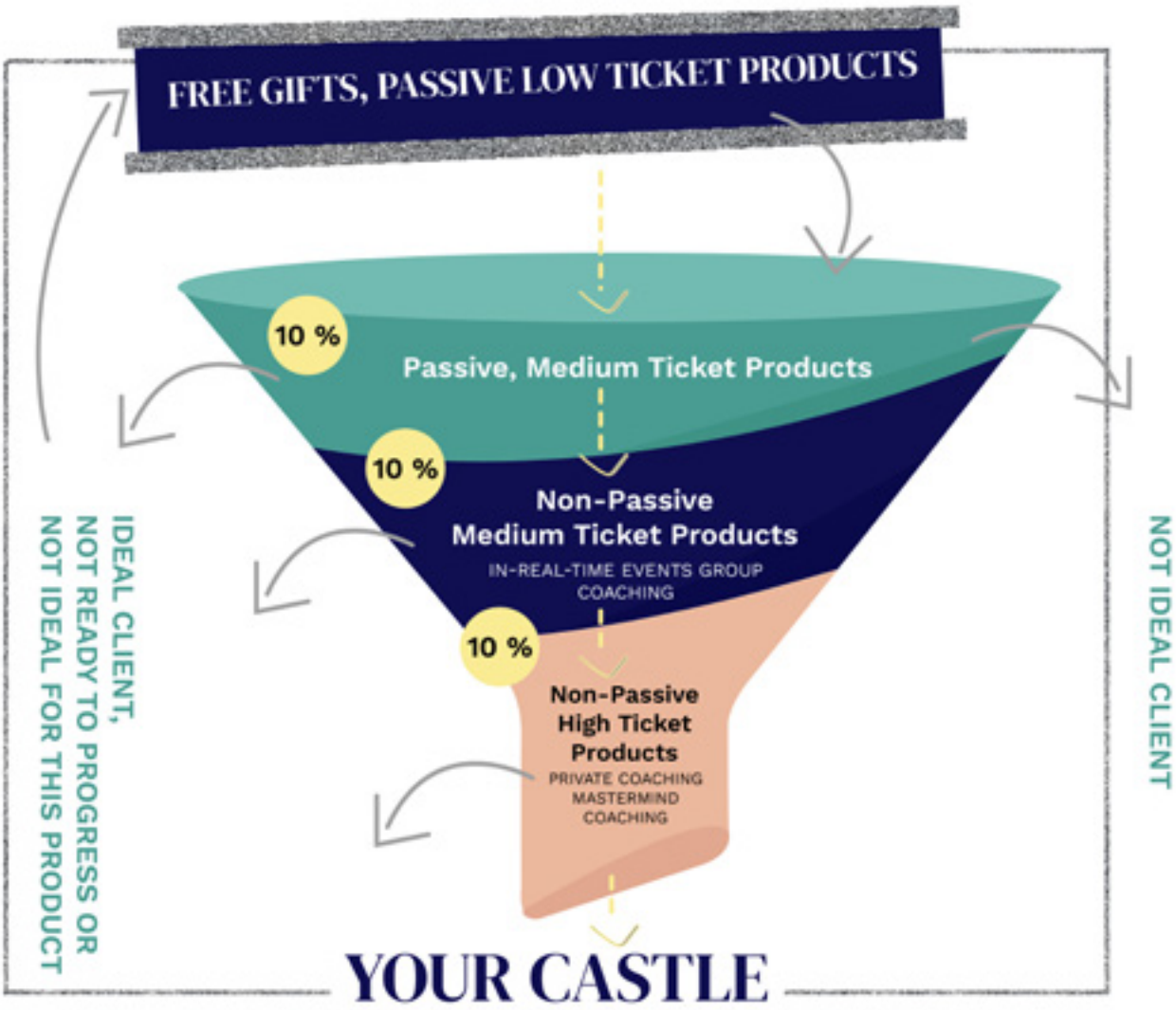
PLATFORM

DIFFERENT KINDS OF PLATFORMS

	STRAINER	vs.	FUNNEL
Social Media & Advertising	Filter out non-ideal clients		Send ideal clients to the next stage of your funnel or if not ready, put them into an engagement campaign.
Events (Live, Virtual, Recorded)	Filter out non-ideal clients		Send ideal clients to the next stage of your funnel or if not ready, put them into an engagement campaign.
Marketing Platforms	Filter out non-ideal clients		Send ideal clients to the next stage of your funnel or if not ready, put them into an engagement campaign.
Referrals, Affiliate, Joint-Venture Offerings	N/A		Referrals are pre-qualified so you can send them right to a buy page, however they still might not be your ideal client, so send them to a passive product in your funnel to weed out the non-ideal clients
Products & Services	Non-ideal clients can purchase passive or group products only.		Products that require your time are for VIP clients only.

Strainer vs Funnel Strategy by Client

Use a strainer to remove people that aren't your ideal client from your funnel, but keep them in your castle; just because they're not a good fit for one funnel, doesn't mean they're a bad fit for all of your funnels. Use a funnel to keep your ideal client moving forward, taking incremental action towards a bigger goal. Completely passive products are great for not-yet-qualified or non-ideal clients. Reserve group products for ideal clients and products that require a significant amount your time for VIP clients. See illustration below...





Next Step

Oprah likes to say

when you know better, do better

So now you know how to streamline your business, it's up to you to do better - to use the information you now have at your disposal to reclaim your precious time, get more qualified leads in your database, and convert them into paying clients.

But, just because you know what to do and even how to do it, doesn't mean you want to do it, or should do it. Maybe technology isn't your thing. Maybe it is, but you have more important things to focus on. Or maybe you've read this whole document and you still don't know where to start. Regardless of where you're at, we can help. Whether you're a DIY type person, a do-it-with-me type person, or a hands off you just want to know it's getting done type of person, we got you covered.

Click here to learn more

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